

**Summary for Deliverable 5.3.3 Team Launch September 22, 2000**

<b>Deliverable 5.3.3</b>	<b>Summary</b>	<b>Results</b>
<ul style="list-style-type: none"> <li>▫ The objective of this deliverable is for the successful design and implementation of the team launch for the Customer Relationship Management team within the Call Centers IPT.</li> </ul>	<ul style="list-style-type: none"> <li>▫ This process will ensure that everyone knows his/her role in the project and on each respective team, as well as be prepared to participate effectively on the implementation teams.</li> <li>▫ The teams are set-up for success, understand their roles and are implementing the first phases of the process road maps.</li> </ul>	<ul style="list-style-type: none"> <li>▫ The Team launch took place on May 31, 2000.</li> <li>▫ All relevant documentation is attached below.</li> </ul>

- Understanding of the context within which this IPT sits so that you can know the importance and relevance of the team's work in the broader context of the Department of Education
- Understanding of the concepts of chartering and process road mapping so that you can see how we are trying to set this IPT up for success
- Understanding of the charter and process road map for this IPT so that you can see how you might benefit from and contribute to its goals
- Understanding of your expectations and hopes for the work of this team so that the team can capitalize on your expertise
- Understanding of your issues and concerns so that we can try to avoid potential gaps or problems
- Understanding of advice and recommendations you would give the team so that we can build on your knowledge
- Understanding of roles, if any, that you might want to play in the process
- A list of next steps

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**CUSTOMER RELATIONSHIP MANAGEMENT- CALL CENTERS IPT  
LAUNCH MEETING -- MAY 31, 2000**

**Participants**

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## ***B        -OUT SESSION RESULTS***

### **Hopes/Expectations**

- One call does it all
- Timely, accurate data to anyone
- Expertise seamless to customer in one minute or less
- System does not get dropped
- We are confident in our system and can track calls
- Ability to answer call quickly – from time of pick-up of call and also quick hand-offs
- Be able to talk to a person (expanded business hours)
- Tell customer in beginning what wait time will be
- Better teamwork
- Process easier for students
- Keep focus on students
- Eliminate maze
- Seamless escalation process
- Addressing all points of contact
- Begin contact with customers early
- Create an operation that the public will feel comfortable calling for the service they need
- Solicit input from all current players and look for “Best Practices” there
- Figure out a way to share knowledge so that questions can be answered
- Work will make a difference – better
- Will not take too long to implement
- Set realistic expectations
- Achieve a level of simplicity
- Make it easier for students to get financial aid
- Start to increase a level of trust between front and back lines
- Ensure that solutions are fully implemented
- Minimal menu options
- Immediately able to indicate if want callers want a person or the menu options
- Expectation of friendly service (let the customer hear the smile)
- Wide variety of ways to make contact
- Phone representatives who are listening
- Not entering account number twice
- World class customer service comparable to best in business – metrics
- Customer service representatives understand bigger picture and where they are in the process
- Reporting by the team is in a standard format every time
- One call does it all (80/20)
- Timely access to correct data
- Accurate data
- Systems compatibility/support
- Consistent answers
- Consistent terminology
- Comprehensive training

- On call enterprise wide
- Qualified staff
- Teams use standard language – everything means the same to everyone

#### **Issues/Concerns**

- Keep reasonable amount of talk and be able to follow-up
- Tracking system
- Interaction between people divulging information
- Proper involvement across channels and partners
- Training – how to use system; how to answer questions
- Doing business in different way requires paradigm shift
- Establishing communications with our partner on how we can do it better
- Setting right performance measures across board
- Variety within current infrastructure
- Employees leaving due to uncertainty
- Improved service leads to more contacts which leads to more costs
- Measuring success
- Contractual issues/obligations
- Implementing “one call does it all”
- Choosing benchmarking industries
- Tracking communication across systems – before something becomes a problem
- Customer satisfaction survey at end of call
- Soft transfer - we stay with customer until hand-off completed
- Ability to provide conference calls across centers
- Availability of data for management and customers
- Security of data
- Wide variety of current environment and moving to a new mindset
- Confidentiality/privacy
- Systems security plan
- We must have “listening in” ability for monitoring incoming calls and that it not be misconstrued as a disciplinary or evaluation of the individual. The team needs to ensure it is seen as a way to reach the customer satisfaction goals.
- Complexity of financial aid process
- Aware that some things are driven by Congress – limitations
- Contracts are too limited ... tie hands of common sense – remove redundancy
- Silos – SFA, Contractors, Congress
- SFA does not impose inordinate rules on contractor operations
- Lines of communication need to remain open
- Can “one call does it all” work
- Money is a concern
- Involvement of everybody
- Reasonable amount of time for training and transition
- Keep current service levels during transition
- Keep regional offices in loop
- Calls “free” or charge per call





### **Advice/Recommendations**

- Include lenders as stakeholders (FFEL community)
- Look at lender tracking best practices
- Assure that there are standards for our service representative, i.e. identify themselves, ask what assistance can I give you, instill that the person who gets the call resolves it, assuring that customer is satisfied and that progress is made
- Being able to suggest alternatives
- Abandon preconceptions
- Define a common terminology
- Look for alternative to call centers
- Provide medium for suggestions (interaction through inter/intra net)
- Look at Quick Hits that go beyond September
- More sharing of knowledge across locations, programs, companies
- Form cooperative teams of business experts – hear concerns and opinions from all players
- Let the contractors solve the problem
- Contractors hired to do the basic business...let them do it
- Identify interfaces between contracts that cause the most problems for the customer
- On-line tutorials for CSR's...learning different contractor business
- Consistency of basic CSR skills
- Core team proportionately represent all channels
- Include students throughout process – focus groups
- Also schools, servicers, and lenders
- Tight involvement with CIO's
- Authority to implement recommendations
- Whatever team on – goals, definitive steps, and order of steps
- Provide demonstration of potential software or potential options
- Communication tight with core team members and sub-teams
- Once the system is determined/purchase early
- Make sure technology works with external partners
- Compatibility of systems
- Qualified, courteous, knowledgeable staff
- Past current status
- Maximum use of technology
- Understand costs breakdowns
- Breadth of CRM should, include “all” contact with customers (internal, external, employees, contractors, partners)
- Use CRM data to understand and service customers better (use data effectively)
- Phased implementation (less impact/easier implementation, control risk)

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<ul style="list-style-type: none"> <li>• Included by phone conference on significant issues</li> </ul>	<ul style="list-style-type: none"> <li>• Include more regional people</li> </ul>
<ul style="list-style-type: none"> <li>• Getting input from everyone, actively involved</li> </ul>	<ul style="list-style-type: none"> <li>• Big group – so give a sense of who is in the room</li> </ul>
<ul style="list-style-type: none"> <li>• Right people in the room</li> </ul>	<ul style="list-style-type: none"> <li>• Bigger room</li> </ul>
<ul style="list-style-type: none"> <li>• Including contractors</li> </ul>	<ul style="list-style-type: none"> <li>• Look into virtual meetings so more people can contribute</li> </ul>
<ul style="list-style-type: none"> <li>• Participative format</li> </ul>	
<ul style="list-style-type: none"> <li>• Big picture in beginning</li> </ul>	
<ul style="list-style-type: none"> <li>• Remote access worked and ability to give input</li> </ul>	
<ul style="list-style-type: none"> <li>• Appreciate team approach without distinction in roles</li> </ul>	